Final Report

University-Based Business Counselling Internship Pilot program

Prepared
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Overview:

To increase the success rate of small businesses in Atlantic Canada, an infrastructure of competently trained individuals must exist. To contribute to the development of such an infrastructure, the *University-Based Small Business Counsellor Internship Program* (the "Program") was planned, developed and delivered by the Acadia Centre for Small Business & Entrepreneurship (ACSBE) in partnership with the Atlantic Canada Opportunities Agency Head Office (ACOA) and six other university-based business development centres (UBDCs).

Mission and Objectives:

The Program had a mission of strengthening the small business environment of Atlantic Canada by developing motivated and competent intervention professionals to work within the business development infrastructure.

To realise this mission, two objectives were set:

1. To introduce small business counselling as a viable career option to recent university graduates by providing exposure to, and understanding of, small business counselling interventions.
2. To develop and equip the recent graduates with the appropriate knowledge, skills and attitudes required for a successful small business counselling intervention within a private, quasi-government or government organisation.

Final approval for the Program was received from ACOA in early December of 1998. Upon notification, ACSBE informed all of the UBDC directors that the selection process for a new intern could begin. Unfortunately, the Christmas season of 1998 delayed the hiring for some UBDCs. However, the following placements were filled by February 1999:

Acadia University	2
Saint Mary's University	1
Saint Francis Xavier University	1
Université Sainte-Anne	1
Mount Saint Vincent University	1
Memorial University	1
Université de Moncton	1

To achieve the above mentioned objectives, the following tasks were completed:

1. A curriculum was developed and delivered that allowed the interns to *acquire* business counselling knowledge, skills and attitudes.
2. An environment was created to allow the interns to *apply* their newly acquired business counselling knowledge, skills and attitudes.
3. The development of university based programming to introduce and prepare future graduates to pursue a career in small business development.

Task 1: Acquiring small business counselling knowledge, skills and attitude...

To provide the interns with an opportunity to acquire small business counselling knowledge, skills and attitudes, the following curriculum was developed and delivered by ACSBE:

Business Counselling Orientation (3 days)

This introductory workshop was held at Acadia University. The goal of the workshop was to introduce the interns to the professional development aspects of the Program to allow the interns to begin to develop both the "soft" and "technical" skills required for a successful business counselling intervention. During the three day session, a number of learning activities were held that focused on the expectations and roles of the business counsellor and the nature of the client/counsellor relationship. Also, the outcomes of a successful counselling session were studied along with the process followed to achieve those outcomes. Finally, the interns were introduced to the knowledge, skills and attitude required to undertake a successful small business counselling intervention.

Marketing Skills Workshop (2 days)

The second workshop focused on the counsellor's role in relation to marketing issues related to assisting a client to make an informed entrepreneurial decision. Particular attention was given to a counsellor's responsibility of not doing market research for the client, but instead, empowering and coaching the client to undertake the appropriate marketing-related activity. Lectures, case studies, group discussions and role-plays were used to develop the interns' abilities to help a client design and implement effective market research, segment their customer base and develop a coherent marketing mix.

Operational Skills Workshop (2 days)

The interns were introduced to the essential items that a small business person must manage in the day-to-day operations of their business. The legal and technological aspects of running a small business were studied as well as the common reasons for business failure. Finally, the appropriate manners of closing a business were discussed.

Financial Skills Workshop (2 days)

By means of case studies, role-plays and other experiential learning activities, the interns developed an understanding of an approach to practical financial topics; the most often misunderstood aspect of business planning. The financial plan was put into proper perspective and particular attention was given to the use of the marketing and operational plan as the foundation of a solid financial plan. Also, best practices were reviewed and discussed as a means to prepare the interns to assist actual clients in the development of well-documented and substantiated financial projections.

Business Planning Skills Workshop (1 day)

During this one-day workshop, the interns used the knowledge and skills acquired in the earlier workshops to develop an understanding of the business planning process. With this understanding, the interns practised, by means of case studies and role-plays, the assisting of clients in the preparation of substantiated, consistent and well-documented business plans. Also, the interns began to develop an ability to recognise and overcome resistance on behalf of clients to appropriate business planning.

Business Analysis and Strategy Workshop (2 days)

This final workshop provided an opportunity to consolidate the previous workshops and to allow the interns to understand the needs of a business in the early post-start-up phase. The interns were exposed to the counsellor's role of assisting a client in assessing their business needs and developing strategies to implement relevant and timely solutions. By means of analysing actual client situations, skills and knowledge in the area of strategic planning in a small business environment were developed.

Task 2: Applying small business counselling knowledge, skills and attitude...

An important aspect of the Program was the provision of opportunities for the interns to apply their counselling knowledge, skills and attitudes in actual counselling situations. ACSBE monitored the interns' practical experience throughout the year and interviewed the interns to determine the work they performed. Below, please find a consolidation of the monitoring and interviewing activities.

<u>Acadia University:</u>

Paul Richards is a graduate of University College of Cape Breton and has a double major in business and political science. Paul spent approximately six months in ACSBE's Kentville office providing "general" small business counselling to clients. During Paul's first month, he was under the direct supervision of a senior business counsellor and did not undertake any counselling sessions on his own. However, within a very short period of time, Paul began to lead counselling sessions (with the senior counsellor present) and

quickly developed as a competent counsellor with some of ACSBE's "less challenging" clients. Within the first three months, Paul progressed to the point of working with clients by-himself and was soon seeing clients that were deemed as a "medium challenge". Finally, after the first six months, Paul had progressed to working with the more challenging clients of ACSBE. In addition to working with actual clients, Paul participated in weekly debriefing and peer-support sessions with all of the client delivery staff of ACSBE.

As a result these sessions and individual professional development meetings, it was identified that Paul had a particular interest in working with youth. To allow Paul to pursue his passion, he was assigned two significant business counselling contracts focusing on youth in October. Paul has performed in an excellent manner and has developed a very extensive individual and group business counselling program focusing on youth-at-risk in the counties of Kings, Lunenburg and Queens. His efforts to date have exceeded the original objectives of the youth contracts and he has developed very close partnerships with other community organisations that have mandates of helping youth. Upon completion of the ACOA internship, Paul was hired as a full-time employee of ACSBE.

Jason Pleasant-Sampson is a member of the black community in Kings County and is a graduate of the University of New Brunswick. Jason was hired as an intern by ACSBE as a result of his demonstrated interest in using community economic development activities to improve the well-being of the black community in Atlantic Canada. Jason's learning curve was very steep during the early phase of the Program as he had only a limited number of business courses at the post-secondary level. However, Jason was a very quick learner and undertook an extensive program of self-study to increase his foundation of business knowledge and skills. In addition to the Program-related training, Jason participated in all of ACSBE's internal training, attended every weekly peer-support and debriefing session and was mentored by senior ACSBE employees who provide cultural-based business assistance interventions.

Once Jason developed a comfort with business counselling, he began to work with a group of local black youth by assisting them to explore an entrepreneurial career. Jason provided business counselling and facilitation interventions to these individuals for the last 4-6 months of his internship. Upon completion of the ACOA internship, Jason decided to leave ACSBE to work with an organisation called "The Kings County Diversity Group" whose mandate is to provide business counselling and advisory services to black youth.

<u>Saint Mary's University:</u>

Ann MacLeod graduated from Saint Mary's University with a Commerce degree. During the early phases of the Program, Ann was unsure of the career that she would choose to pursue and was very happy to be given the opportunity to explore a career in assisting small business clients. Upon completion of the Program, Ann has decided that she will pursue a career in the area of providing small business interventions, but has

developed competencies more closely aligned with consulting. In speaking with Ann, she has noticed that when dealing with clients, a UBDC will provide different types of services in its attempt to improve the local entrepreneurial environment. In particular, the services can be classified as either business counselling, business consulting or business facilitation/training. She further noticed that the students of a UBDC's related university possess considerable ability that, if clustered properly, can be used to assist small business clients. Upon completion of the ACOA internship program, Ann was given a full-time position with the Saint Mary's Business Development Centre and provides advisory services to small business clients with the assistance of students in the MBA program.

St. Francis Xavier University:

Michael Forbes graduated from Saint Francis Xavier University with a Bachelor of Business Degree with a major in accounting. Michael had a particular interest in accounting and in helping small business people help themselves. During the early months of the Program, Michael worked as a junior counsellor to Rachel Sullivan (an ACOA intern-alumni from last year's program) and assisted a number of small business clients in making an informed entrepreneurial decision. Michael progressed quickly and began to undertake counselling sessions on his own. Also, Michael developed an interest in working with youth clients and began assisting a number of youth organisations to increase the entrepreneurial and small business spirit of local youth.

Upon completion of the ACOA internship, Michael left the UBDC at St. Francis Xavier University and moved to Calgary to be closer to family. Michael is considering enrolling in a professional accounting program to eventually focus on assisting small business clients.

Université Sainte-Anne:

Francine Saulnier graduated from l'Université Saint-Anne with a degree in business administration. During the early months of the Program, Francine worked directly with clients under the supervision of *Lenore Deveau* and *Shephane Cyr,* two graduates of last year's ACOA internship program,. In addition to working closely with the senior business counsellors, Francine attended daily peer-support sessions at the Jodrey Centre. Upon becoming comfortable with working clients, Francine began to work with clients on her own and upon the completion of the ACOA internship program, was hired as a full-time business counsellor by the Jodrey Centre.

Mount Saint Vincent University:

Dan Allain graduated from the University of New Brunswick with a Bachelor of Business Administration degree. Dan worked very closely with the senior business counsellors at the Centre for Women in Business and had direct contact with a number of small business clients in all phases of the business development life-cycle. Dan was particularly skilled in group counselling and training and thus planned and delivered a number of group interventions to help the Centre for Women in Business assist its female clients make solid business decisions.

Upon completion of the ACOA internship program, Dan was offered a position with the Worker's Compensation Board as a direct result of the knowledge, skills and experience he gained during the last year. In his new position, he is responsible for all of the "Special Protection" accounts in Nova Scotia. "Special Protection" accounts are for sole proprietors and partnerships and related family members living in the same household.

Memorial University:

Trevor O'Keefe graduated from Memorial University with a Bachelor of Business Administration degree. Trevor worked closely with P.J. Gardiner Institute's community partners to assist individuals living in rural areas that have been negatively affected by the fishing crisis. In particular, Trevor assisted clients in the preparation of business plans who would then apply for government-related interventions, such as the Self-Employment Benefits program sponsored by Human Resources Development Canada.

Upon completion of the ACOA internship program, Trevor was offered a position with the Royal Canadian Mounted Police (RCMP) and is presently in Regina completing his training. Trevor has an interest in the RCMP's community policing initiatives and is sure the small business counselling competencies he developed during the Program will assist him in his new career.

Université de Moncton:

Janic Comeau graduated from Université de Moncton with a Bachelor of Business Administration degree. This was the first year Université de Moncton participated in the Program. It was planned that as a result of this initiative, the Centre Assomption de recherche et de développement en entrepreneuriat (CARDE) would develop the capacity to deliver small business counselling services to the local community. Towards this end Janic travelled to the various UBDCs to gather input and advice on the development and delivery of a small business counselling program. After conducting extensive research, adopting best practices and developing programming unique to the local environment, Janic began to assist members of the university community in the exploration of small business career. Also, referrals for entrepreneurial assistance were initiated during the year from local community organisations. For example, clients were referred to CARDE from the Chamber of Commerce.

CARDE continues to be very committed to offering small business counselling services to the local community by appropriately combining its own resources with those of the Université. An expression of interest has been made by CARDE to participate in another internship program to expand its current business counselling services and the Director looks forward to strengthening the newly developed partnerships with the other UBDCs of Atlantic Canada.

Task 3: The development of university based programming...

The last task undertaken towards the accomplishment of the Program's objectives included development and delivery of additional academic programming, within the respective universities, relative to small business interventions. This continues to be a slow process as working "back into" the university environments must be done on an incremental basis.

Interagency Cooperation

At one time, the UBDCs in Atlantic Canada competed with each other and were very secretive with programming. This lack of synergy was not conducive to creating a better environment for small business development in the region. However, the Program changed this situation by instigating the formalisation of partnerships with the five Nova Scotia UBDCs and with the P J Gardiner Institute of Memorial University in Newfoundland. During this year's Program, the partnership has been extended to include the Université de Moncton. While this increased activity within the UBDCs does not lead to academic programming directly, it heightens the awareness of the activities of the centres within academia.

Specific University Initiatives:

It would be unfair and inappropriate to compare the advancements of the various universities as the relationships between UBDCs and their respective universities are as varied as the number of UBDCs. The related academic activity is as equally as varied. There have been, however, significant developments.

- The intern at Université Sainte-Anne worked closely with other staff members in the development and delivery of a small business course to senior business students. Students in the course learned how to plan, start and operate a small business enterprise.
- The intern at Saint Francis Xavier University worked very closely with the university community in an attempt to increase the entrepreneurial programming on campus. In particular he worked with the Association of Collegiate Entrepreneurs, promoted the YES program to students and worked directly with faculty to bring actual clients into the classroom. Also, work was done on developing a student consulting program and a student entrepreneurial research competition.
- The intern at Saint Mary's University now works with an under-grad business consulting course and an MBA business-consulting course. These courses require students to complete a project for one of SMUBDC's clients during the semester. As part of her duties, the intern guided the students to ensure the projects were properly completed.
- The intern at Acadia University participated in ACSBE's "on-campus" programming. ACSBE has been instrumental in the introduction of the Acadia Community, Social, & Economic Entrepreneurial Program. This interdisciplinary program promotes entrepreneurial thinking throughout all sectors of the academic community. ACSBE continues to offer courses in the School of Business entitled "Small Business Consulting and Facilitation" and "Small Business Counselling". The winter-term includes a practicum that provides experiential learning for interested students.
- The intern at Mount Saint Vincent worked closely with classes from different disciplines to help entrepreneurialise the learning environment. For example, it involves working with those studying Food Science and Nutrition. Also, the intern worked with co-op students who wished to pursue an entrepreneurial career.

Recommendations and Conclusions

This internship program has been deemed a success as all eight of the interns are fully employed with six identifying small business counselling as a viable career option (please see appendix A), one pursing a career in community development with the RCMP, and one having become self-employed in the restaurant business. Even with such a high placement ratio, interviews with the directors and interns have provided valuable input for future changes that will make the program an even more relevant factor in the economic development of Atlantic Canada.

The UBDCs of Atlantic Canada have a mandate of bringing together the resources of the respective centres and related universities in a manner that contributes to the economic development of the local area. To fulfil this mandate, the UBDCs have developed programming to assist small business clients by means of different delivery models. This reality has resulted in the directors and past participants suggesting that future offerings of an internship program be expanded to include other forms of small business interventions. In particular, they have recommended that a program be developed around the following models: business counselling, business consulting and business facilitation/training. These models can be defined in the following manner:

- *Small business counselling* is a process-based form of intervention, which focuses on empowering the client to take responsibility for making an informed entrepreneurial and/or small business decision. The business counsellor does not behave as a functional expert but instead, acts as a guide, or coach, for the client to ensure the necessary steps of the entrepreneurial process are followed.
- *Small business consulting* is a form of business assistance whereby recommendations are made, and solutions are provided, to the client. The intervener relies on a base of personal and peer expertise to perform work for the client.
- *Small business facilitation/training* is a group-based approach of small business intervention where the principles of adult education are employed to provide both process-based and knowledge-based assistance to a collection of clients. The principles of adult education are premised on the fact that adults learn by undertaking activities that include (to various degrees depending on the learner) planning, doing, observing and evaluating.

It has been recommended that all three models be covered as the agreed upon "mark" of a true small business intervention professional is the ability to draw upon any one of those models, or combination thereof, in a manner that truly allows a client to make an informed entrepreneurial decision.

In conclusion... The infrastructure of competent individuals assisting small businesses continues to grow in Atlantic Canada as a direct result of internship programs offered in partnership with ACOA and the UBDCs. It is the belief of the individuals involved in this program that the sharing of resources and the provision of professional development and opportunities for recent graduates to gain practical experience should continue. It is

therefore the hope of the UBDCs that a new internship program be offered next year in partnership with ACOA.

Appendix A

Results Internship Programs:

ACSBE has administered a number of internship programs in conjunction with strategic partners. Below, please find the results of these programs:

Shelly O'Donnell	Employed as a small business account manager with CIBC and has been described by the Regional Manager for Nova Scotia as being able to advance at a very rapid pace as a direct result of her training in the UBDC-based internship program.
Jill Hiscock	Employed as the Associate Director for ACSBE with a mandate to entrepreneurialise the educational culture of Acadia University. Jill's programs have been identified by other universities as being very innovative and interest is being expressed to adopt similar programming on other campuses.
Julie Miller	Employed as a business intervener with a private consulting and training company in Halifax.
Korey Richardson*	Employed as a business counsellor with a community business development agency in charge of major projects in the City of London, Ontario. Korey moved to London to be with his fiancée who is attending dental school at the University of Western Ontario. Upon graduation, Korey and his future wife plan to return to rural Nova Scotia to pursue a career in small business development and rural dental practice respectively.
Rob Densmore*	Employed as a small business specialist with Human Resource Development Canada in Newfoundland-Labrador.
Lenore Deveau*	Employed as the Assistant Director for the Centre Jodrey at the University of St. Anne.
Stephan Cyr*	Employed as the Senior Business Counsellor for the Centre Jodrey at the University of St. Anne.

Appendix A Continued...

Rachel Sullivan*	Employed as the Senior Business Counsellor for the Enterprise Development Centre at the St. Francis Xavier University.
Kerri Williams*	Employed with the "Canadian Women's Foundation" assisting not-for-profit organisations be more entrepreneurial in becoming self-sufficient.
Lawrence McCackern*	Employed as a business consultant for the Business Development Centre at Saint Mary's University, Lawrence has recently been given the responsibility to planning, developing and delivering entrepreneurial training to aspiring small business people in metro Halifax area.
Jason Clark	Employed with Grant Thorton in their small business services division.
Tanya MacIntyre*	Tanya decided to return to pursue her Masters Degree in Information Technology Education. She is presently employed as the Database Department Head at the Dunwoody Campus of American InterContinental University in Atlanta Georgia. She is responsible for the organisation of the Database department including scheduling, evaluations of faculty, curriculum development and budgeting. She also co-ordinates classroom delivery, assessments of faculty needs and procedure and policy development to be used within class and the department.
Gina Grandy*	Teaching entrepreneurship and small business management at Mount Allison University.
Michael Forbes*	Has relocated to Calgary to be closer to family.
Dan Allain*	Employed as a "Special Protection" accounts counsellor for the Worker's Compensation Board.
Francine Saunier*	Employed as a business counsellor for the Centre Jodrey at the University of St. Anne.
Janic Comeau*	Employed as a Co-operative Education Assistant at the Université of Moncton.

Appendix A Continued...

Trevor O'Keefe*	Pursuing a career with Royal Canadian Mounted Police.
Ann MacLeod*	Employed as a business consultant with the Business Development Centre at Saint Mary's University working a number of special projects.
Paul Richards*	Employed as business counsellor with ACSBE in charge of youth counselling.
Jason Pleasant-Sampson*	Employed as a culture diversity business counsellor with a community organisation called "Kings County Youth Diversity Group".

(* Signifies an Intern of an ACOA Program)

Please note that in order to better reflect the intent of actions implemented in some measures, the following changes have been made to Appendix B of the Commercial/Institutional Options Report.

- For measures C7, C8, AE1 and AE9, the first bullet under Indoor and Ambient Quality in the Health Impact category has been removed and replaced by "Reduced exposure to indoor air contaminants (VOCs particulates, etc.) due to improved ventilation in buildings - leading to decreased incidence of eye irritation, headaches, fatigue, respiratory diseases, and cancer".

- In all measures, the word "Potentially" has been added to the word "Increased" for all negative impacts listed under the Environment and Health Impact categories .

- Furthermore, these negative impacts have been marked by an asterisk leading to this note: "When this measure is properly implemented, potential negative impacts will be marginal or eliminated".